ENTRUST Online (EOL) Survey Report 2022

1.   Introduction

1.1.   ENTRUST Online (EOL) is our online database that enables Environmental Bodies (EBs) to access, update, file and comply with all of their regulatory obligations with ENTRUST. EOL also allows EBs to undertake and manage their own data rather than being reliant on our administration, which we believe reduces the administrative burden on all parties.

1.2.   In 2021, ENTRUST's EB Satisfaction Survey indicated that a minority of EBs had found EOL difficult to use, or confusing. In order to understand exactly which areas could be improved, or adapted, we set out in our 2021/2022 Corporate Plan our intention to consult EBs on their experience(s) of using EOL and where they considered changes could be made to improve its operation.

1.3.   This report details the analysis of the responses and considers the impact of potential improvements arising from the review. In developing the review's terms of reference, we focused our questions on areas where EB's feedback indicated they were relevant to their experience of operating EOL. For example, only those EBs who indicated that they had filed an Annual Return prior to the survey were asked questions on Annual Returns.

2.   Themes and Comparisons

2.1.   Before considering in more detail each specific area, or Forms for review, we identified some key areas of comparison that highlight the overall themes which provided preliminary indicators regarding the overall EB satisfaction with EOL.

2.2.   Regarding ease of use, the majority of respondents considered all of the Forms on EOL either easy, or very easy to use. Of the remaining number, a small minority found the Forms difficult to use, with the Form 7 and uploading documents as part of the compliance process they identified as the most difficult to use. However, based on this feedback it appears that EOL remains easy to use for the majority of EBs and it does not require more drastic changes to remain fit for purpose.

2.3.   ENTRUST received similar feedback regarding the navigation and accessibility of EOL, with the majority of EBs reporting the Forms on EOL as relatively easy to find and navigate. Only a small number found any difficulty, but, the Form 4 did score slightly lower on this measure, which is explained in more detail in Section 6. No significant changes in EOL layout, or Form layout were suggested on the basis that the majority of EBs are content with the system. However, small changes may be appropriate based on some of the feedback, which is highlighted in Appendix A, as analysed in the relevant sections of this report.

2.4.   The survey question on whether the different Forms on EOL worked as expected recieved overwhelmingly positive responses. The only item that received a small number of negative responses related to the Form 2.

2.5. Another very positive set of responses was the feedback on how helpful the 'How To' Guides were. The only exception related to the document upload guide, which a few respondents found less helpful.

2.6. While those that used the guides found them helpful, a minority of EBs were not aware that certain 'How To' guides existed. For those that provided this response, 68 per cent use EOL less than once a month, indicating that more frequent users of EOL were more aware of the existence of them, which would be expected. For those that were aware and did not use the guides, the responses indicate that this is because they are not necessary for those who have been working on EOL for some time and already know the system well. However, it is possible that the 'How To' guides could feature more prominently to enable all EBs, including those that use EOL only occasionally, to benefit from them and access the support.

2.7. The primary assessment from the feedback is that EOL is working well, is easy to use, and works as expected for the majority of EBs. There are a few EBs who consider EOL is not working as well for them and the analysis of their responses in the following sections recommend some specific changes that could be made to improve the system. In summary, no major change is recommended on the basis of the feedback that we received.

2.8. The 'How To' Guides for each area of EOL are reported as helpful for those that use them, while there is a suggestion that there could be better awareness for some EBs of the existence and location of this provision.

3.   The EOL Dashboard

3.1. Section 1 of the survey asked several questions about the dashboard, the area which EBs land at first when logging into EOL. The majority of respondents considered that the items on the dashboard were extremely, or very helpful, with a minority disagreeing.

3.2. The Survey also asked whether email reminders of items on the dashboard would be helpful, and if so, which information would be beneficial:

Option	Answer Choices	Responses	Percentage of total respondents
1	None of the above	5	10%
2	A reminder that your project is approaching its end date	37	73%
3	A reminder that you need to fill in a Project Completion Form	35	69%
4	A reminder to update Contacts/Governing members	29	57%

3.3. Despite all three email options being popular, Option 2 was highlighted as the one with the most value with Option 3 a close second. Option 4, reminders regarding updating governing members, are likely to be more of a hinderance than a help via an email as this is not time dependent and it is not clear when and how frequent reminders would be. Additionally, this is already addressed as a key area in the existing Annual Returns strategy, where EBs are reminded to review and update their contact details and

governing members, twice a year. To minimise the amount of email correspondence, we will look to combine the two more popular options and create one email, automatically generated by EOL when a project, or projects are due to complete. For larger EBs, this would mean a maximum of 12 emails in one year that can list multiple projects, an acceptable level for the most active of EBs.

4. Changing Directors, Contacts and EB information

4.1. Only four per cent of all respondents indicated that they had any issues updating Directors, contacts or changing EB information. Whereas there are indications from conversations with EBs that this was previously problematic, issues do not appear related to the usability of the forms.

4.2. Two comments did identify that their issues related to read only information which may be the root of some if the issues as it can cause some confusion. This is because the contact address and governing members are the only items that can be changed when logged in as an EB. However, this is unavoidable, as it would not be appropriate to allow EBs to amend certain information without first informing ENTRUST. Therefore, no changes are recommended at this time.

5. Form 2: Project application forms

5.1. Form 2 results were consistently positive across all measures. However, there were a few insightful comments that are worth noting that may explain the minority of negative answers, or provide helpful suggestions for improvement:

5.2. One suggestion was to include a document upload feature on the cost breakdown page. However, it is important to identify exactly what the LCF is funding, meaning that the cost breakdown remains a vital part of the project application process. To introduce a document upload feature on this page may indicate that uploading quotes is sufficient for project approval, rather than filling in a detailed cost breakdown on the Form 2. This can be due to the LCF only funding a percentage of the project, and it would be unusual for quotes to separate out costs into LCF costs and those from other funding sources. As a result, we would anticipate a rise in projects pended for this reason and believe it is in the interests of all Stakeholders to keep any document upload feature to the further details section to avoid this eventuality.

5.3. The question regarding the protection of the environment and aesthetic improvement is included to separate the public access and financial details from other project information required by the Regulations. Based on this, it is not suggested that these are removed; however, it could be clarified exactly what these are for or reworded making clearer what information is being requested. An information button could provide more clarity as to what is required in these text boxes if appropriate.

5.4. The survey also asked questions on project extensions found within the Form 2 on EOL. There was only one responder who encountered issues; however, there are no comments to indicate what this issue was. Therefore, no changes are recommended to the project extension process at this point.

6. Form 4: Statutory Annual Return

6.1. Across the results, the Form 4 received generally positive feedback with some areas for improvement identified. However, it is reflected in the comments that the Form 4 is unlikely to be as easy as other Forms due to the nature of the information required. It

is not surprising to see slightly lower results than much simpler sections of EOL. This is further evidenced in that there were no negative answers for those that had filed the Form 4: nil-return, a simpler form to report no LCF monies were held, received or spend in the period. Of the responders who did provide negative answers, these were based on the full return.

6.2. More specifically, 10 per cent of respondents found some of the Form 4: Full Return difficult to understand. However, there are a lack of comments that can point to specific issues, stating more generally that it can be difficult but necessary. Therefore, no changes are proposed to the Annual Return.

7. Form 3: Contributions and Form 7: Fund Transfers

7.1. Both Forms 3 and 7 received high scores across all areas of EOL, likely because of their simplicity and clarity of use.

7.2. There was one negative comment which relates to an issue already actioned, removing Contributing Third Party (CTP) details from the Form 7.

7.3. The one suggestion for change was to move to the previous way of reporting, which required the EB to report on the Form 7 details of the project that funding was transferred to. This would involve typing in the project numbers instead of selecting the project from a drop-down menu. However, this feature does allow for the recognition of when projects have not been allocated, when they are expected to be, or when projects are listed as completed in error. The benefits of identifying errors are of significant help to ENTRUST as a regulator.

7.4. On the basis of the above information, no changes are necessary to the Form 3 or 7.

8. Form 9: Project Completions

8.1. The majority of responses were positive for the Form 9. The comments received regarding suggestions for improvement were as follows:

- One responder commented that there was more to environmental benefit than trees; and.

- Another responder asked for more space to be given on question 14. This is easy to do, so is suggested to be implemented.

8.2. As the Form 9 has been developed recently from the outcome of the Value for Money (VfM) consultation in 2020, it is not suggested that further changes to VfM questions are made at this point, adding unnecessary administration for EBs. However, we will undertake further reviews of both the Form 2 and 9 in 2022/2023 as part of our continuous improvement work, with comments from this survey feeding into that process to assess if further changes are required.

9. Compliance Uploads and Other Comments

9.1. Only one responder of those who took the survey reported difficulties with the compliance upload section of EOL. However, we have received communication outside of this survey which indicates that there had been a few issues in this area.

9.2. The main comment was that the EB had too many documents to upload to make this an easy process. An easier route would have been to be able to share a previously prepared folder by Google Drive, or similar cloud service. It is already a feature of EOL

to enable a zipped folder to be uploaded which should mitigate this issue. This facility may therefore need to be communicated to EBs, as it may not be clear enough. Using zipped files may be something that can be accepted as an alternative and is worth considering as an option, particularly for larger EBs.

9.3. In general, two respondents commented that EOL looks dated and could hold less information. However, EOL caters for those who use it on a daily basis to those that use it once a year. As this may be the only occasion that an EB looks for information from ENTRUST, there is a minimum amount of text that must be displayed to ensure it is a system that works for all EBs.

9.4. As the vast majority are content with the system, ENTRUST considers that it is fit for purpose with no major changes required to ensure EBs are able to submit the information they need to ENTRUST.

10. Implementation Plan

10.1. Overall, while the majority of Stakeholders are content with the system there are a number of changes that can be made to improve its operation. To address these areas, all of the proposed updates will be implemented from June 2022.

10.2. **Changes already in progress or completed**

10.2.1. As already identified in response to the Training and Guidance Provision Consultation 2021, the location and awareness of 'How To' guides will be assessed as part of our yearly website review.

10.2.2. The document upload issue on Form 2s, where information on the Form was deleted when uploading a document has been fixed.

10.3. **Dashboard and Email Reminders**

10.3.1. As stated in section 3.3, one email reminder was suggested as the best solution to answer the wishes of EBs. Therefore, we will implement one additional email reminder detailing the projects due for completion, which will be automatically generated at the same point each month if projects due to complete in the next month, or past their completion date, are present on the dashboard. This will include a message to remind EBs that once a final payment has been entered, they should fill out their project completion form. This will cover the two email reminders that 70% reported to be the most helpful in one communication, minimising the number of additional mailings while helping EBs with useful information.

10.4. **Form 2 and Form 9 Changes**

10.4.1. The ENTRUST Helpline email address and telephone number will be added to EOL, clearly marked on the header of the page.

10.4.2. The wording on the question regarding the natural environment and aesthetic improvements has been reviewed to determine if it can be clearer. As these are words developed from the definition of an amenity it is important to maintain this wording; an information button will be added to inform with examples as to what is required in the protection of the environment and improving aesthetics text box.

10.4.3. The project application form will change to enable EBs to remove documents they have uploaded prior to submitting the form.

10.4.4. The text box on Q14 of Form 9 will be increased in size to allow greater visibility.

10.5. **Compliance Uploads**

10.5.1. As it is already a feature to be able to upload one zipped file that contains all requested compliance documents, it is not suggested that cloud service file sharing should be accepted as this will undermine the security measures in place with the current system. The visibility of the zipped file option will be highlighted on EOL and made clearer within the guidance documents.

10.6. This implementation plan covers the majority of requests, comments and overall themes that are evident from the responses of EBs to the survey. While there are a few comments that detail requests that we will not be implementing, these reasons have been outlined during this report.

ENTRUST

May 2022

APPENDIX A – Questions and Answers

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The following table sets out all questions asked and the numerical answers for the 77 respondents:

Question	Answer Choices	Responses
Q1 – How often do you use EOL?	Daily	**2**
	Weekly	**10**
	Monthly	**11**
	Less than once a month	**38**
	Never	**16**
Q2 - Do you find the information on the EB Dashboard useful?	Extremely useful	**4**
	Very useful	**25**
	Somewhat useful	**18**
	Not so useful	**2**
	Not at all useful	**0**
	Not sure	**5**
Q3 - The EB Dashboard reminds EBs to update their contact details. Do you think the reminders about contact information are useful?	Extremely useful	**6**
	Very useful	**27**
	Somewhat useful	**13**
	Not so useful	**4**
	Not at all useful	**1**
	Not sure	**2**
Q4 - Is it useful to have a countdown to your next Statutory Annual Return on the Dashboard?	Extremely useful	**9**
	Very useful	**23**
	Somewhat useful	**13**
	Not so useful	**4**
	Not at all useful	**0**
	Not sure	**2**
Q5 - Projects with upcoming end dates, those with passed end dates and those with outstanding completion forms are shown on the dashboard. Are these reminders useful?	Extremely useful	**15**
	Very useful	**24**
	Somewhat useful	**8**
	Not so useful	**0**
	Not at all useful	**1**
	Not sure	**3**
Q6 - When submitting various forms, EOL automatically sends email	Extremely useful	**21**
	Very useful	**23**

confirmations. Is this something you find useful?	Somewhat useful	4
	Not so useful	1
	Not at all useful	2
	Not sure	0
Q7 - Would you find emails to remind you of tasks due for completion helpful?	A reminder that your project is approaching its end date	37
	A reminder that you need to fill in a Project Completion Form	35
	A reminder to update Contacts/Governing members	29
	None of the above	5
Q8 - Prior to this survey, have you ever needed to update any directors (or other governing members such as trustees or members of a governing council/committee), or other contacts, or change any basic information about your EB (such as address and corporation/governance information)?	Yes	31
	No	16
	Not sure	3
Q9 - Did you encounter any issues finding or changing directors and contacts? If you can recall, please detail your experience.	Yes	1
	No	26
	Can't recall	4
Q10 - Did you encounter any issues finding or changing EB information? If you can recall, please detail your experience.	Yes	1
	No	24
	Can't recall	6
Q11 - Do you have any other suggestions regarding the directors, contacts and EB information pages on EOL?	N/A	
Q12 - Prior to this survey, have you submitted a Project Application Form on EOL?	Yes, within the last year	19
	Yes, a year or more ago	11
	No	16
	Not sure	4
Q13 - Were you aware that there is a 'How to' guide on completing a Project Application Form?	Yes, I was aware and I used it	14
	Yes, I was aware but I did NOT use it	9
	No, I was not aware	4
	Can't recall	3

Q14 - How helpful was the How to Guide in completing your Project Application Form?	Extremely helpful	**2**
	Very helpful	**11**
	Somewhat helpful	**1**
	Not so helpful	**0**
	Not at all helpful	**0**
	Don't recall	**0**
Q15 - How easy did you find the Project Application Form to use?	Very easy	**7**
	Easy	**11**
	Neither easy nor difficult	**7**
	Difficult	**0**
	Very difficult	**1**
	Can't recall	**4**
Q16 - Did you find any of the questions in the Project Application Form difficult to understand?	Yes	**4**
	No	**17**
	Can't recall	**9**
Q17 - Did the Project Application Form work as you expected it to?	Yes	**21**
	No	**3**
	Not sure	**0**
	Can't recall	**6**
Q18 - How easy was the Project Application Form to find and navigate?	Very easy	**8**
	Easy	**12**
	Neither easy nor difficult	**5**
	Difficult	**1**
	Very difficult	**0**
	Can't recall	**4**
Q19 - Were there any issues uploading documents in the Project Application Form?	Yes	**5**
	No	**18**
	Can't recall	**6**
	N/A	**1**
Q20 - Prior to this survey, have you tried to extend a project on the EOL system?	Yes, within the last year	**8**
	Yes, a year or more ago	**8**
	No	**13**
	Not sure	**1**
Q21 - How easy was it to find the page to complete your project extension?	Very easy	**11**
	Easy	**3**
	Neither easy nor difficult	**0**

	Difficult	0
	Very difficult	1
	Can't recall	1
Q22 - Did you have any difficulties in extending this project?	Yes	1
	No	13
	Can't recall	2
Q23 - Do you have any other suggestions for improvement regarding the Project Application Form on EOL?	N/A	
Q24 - Prior to this survey, have you submitted a Statutory Annual Return on EOL?	Yes, within the last year	27
	Yes, a year or more ago	9
	No	9
	Not sure	4
Q25 - Thinking back to your most recent Statutory Annual Return, was it a...	Nil return (ie no funds or activity to report)	20
	Full return (ie with funds and/or activity to report)	15
	Not sure	2
Q26 - Were you aware that there is a 'How to' guide on completing your Statutory Annual Return?	Yes, I was aware and I used it	19
	Yes, I was aware but I did NOT use it	13
	No, I was not aware	5
	Can't recall	0
Q27 - How helpful was the How to Guide in completing your Statutory Annual Return?	Extremely helpful	1
	Very helpful	15
	Somewhat helpful	3
	Not so helpful	0
	Not at all helpful	0
	Don't recall	0
Q28 - How easy did you find the Statutory Annual Return form to use?	Very easy	5
	Easy	19
	Neither easy nor difficult	9
	Difficult	1
	Very difficult	1
	Can't recall	2
Q29 - Did you find any of the questions in the Statutory Annual Return	Yes	3
	No	28

difficult to understand?	Can't recall	**6**
Q30 - How easy was the Statutory Annual Return form to find and navigate?	Very easy	**8**
	Easy	**14**
	Neither easy nor difficult	**12**
	Difficult	**0**
	Very difficult	**1**
	Can't recall	**2**
Q31 - Did the Statutory Annual Return form work as you expected it to?	Yes	**30**
	No	**1**
	Not sure	**2**
	Can't recall	**3**
Q32 - Do you have any other suggestions for improvement regarding the Statutory Annual Return on EOL?	N/A	
Q33 - Prior to this survey, have you submitted a Contribution Form on EOL?	Yes	**15**
	No	**26**
	Not sure	**8**
Q34 - Were you aware that there is a 'How to' guide on completing your Contribution Form?	Yes, I was aware and I used it	**7**
	Yes, I was aware but I did NOT use it	**7**
	No, I was not aware	**2**
	Can't recall	**0**
Q35 - How helpful was the How to Guide in completing your Contribution Form?	Extremely helpful	**0**
	Very helpful	**4**
	Somewhat helpful	**2**
	Not so helpful	**0**
	Not at all helpful	**0**
	Don't recall	**1**
Q36 - How easy did you find the Contribution Form to use?	Very easy	**5**
	Easy	**9**
	Neither easy nor difficult	**2**
	Difficult	**0**
	Very difficult	**0**
	Can't recall	**0**
Q37 - How easy was the Contribution Form to find and navigate?	Very easy	**5**
	Easy	**9**
	Neither easy nor difficult	**2**

	Difficult	0
	Very difficult	0
	Can't recall	0
Q38 - Did the Contribution Form work as you expected it to?	Yes	14
	No	0
	Not sure	1
	Can't recall	1
Q39 - Do you have any other suggestions for improvement regarding the Contribution Form on EOL?	N/A	
Q40 - Prior to this survey, have you submitted a Fund Transfer Form on EOL?	Yes	11
	No	30
	Not sure	8
Q41 - Were you aware that there is a 'How to' guide on completing your Fund Transfer Form?	Yes, I was aware and I used it	4
	Yes, I was aware but I did NOT use it	7
	No, I was not aware	0
	Can't recall	0
Q42 - How helpful was the How to Guide in completing your Fund Transfer Form?	Extremely helpful	0
	Very helpful	0
	Somewhat helpful	3
	Not so helpful	0
	Not at all helpful	0
	Don't recall	0
Q43 - How easy did you find the Fund Transfer Form to use?	Very easy	4
	Easy	3
	Neither easy nor difficult	2
	Difficult	1
	Very difficult	0
	Can't recall	0
Q44 - How easy was the Fund Transfer Form to find and navigate?	Very easy	4
	Easy	4
	Neither easy nor difficult	2
	Difficult	0
	Very difficult	0
	Can't recall	0

Q45 - Did the Fund Transfer Form work as you expected it to?	Yes	9
	No	0
	Not sure	0
	Can't recall	1
Q46 - Do you have any other suggestions for improvement regarding the Fund Transfer Form on EOL?	N/A	
Q47 - Prior to this survey, have you submitted a Project Completion Form on EOL?	Yes	23
	No	18
	Not sure	7
Q48 - Were you aware that there is a 'How to' guide on Project Completion Form?	Yes, I was aware and I used it	9
	Yes, I was aware but I did NOT use it	11
	No, I was not aware	3
	Can't recall	0
Q49 - How helpful was the How to Guide in completing your Project Completion Form?	Extremely helpful	1
	Very helpful	6
	Somewhat helpful	1
	Not so helpful	0
	Not at all helpful	0
	Don't recall	1
Q50 - How easy did you find the Project Completion Form to use?	Very easy	4
	Easy	12
	Neither easy nor difficult	5
	Difficult	0
	Very difficult	1
	Can't recall	1
Q51 - How easy was the Project Completion Form to find and navigate?	Very easy	4
	Easy	14
	Neither easy nor difficult	3
	Difficult	0
	Very difficult	1
	Can't recall	1
Q52 - Did the Project Completion Form work as you expected it to?	Yes	20
	No	0
	Not sure	0
	Can't recall	3

Q53 - Do you have any other suggestions for improvement regarding the Project Completion Form on EOL?	N/A	
Q54 - Prior to this survey, have you uploaded any documents as part of a compliance review?	Yes	**11**
	No, I had a compliance review but did not need to upload documents	**10**
	No, I have not had a compliance review	**14**
	Not sure	**13**
Q55 - How easy did you find uploading documents to EOL as part of your compliance review?	Very easy	**4**
	Easy	**4**
	Neither easy nor difficult	**1**
	Difficult	**0**
	Very difficult	**1**
	Can't recall	**1**
Q56 - Were you aware that a 'How to' guide was available for uploading documents?	Yes, I was aware and I used it	**6**
	Yes, I was aware but I did NOT use it	**3**
	No, I was not aware	**2**
	Can't recall	**0**
Q57 - How helpful was the How to Guide when uploading your documents?	Extremely helpful	**0**
	Very helpful	**4**
	Somewhat helpful	**1**
	Not so helpful	**0**
	Not at all helpful	**1**
	Don't recall	**0**
Q58 - Do you have any other suggestions as to how the document upload service on EOL could be improved?	N/A	
Q59 - Do you have any other suggestions for improving EOL or any other feedback about EOL?	N/A	
Q60 - Is there any feedback you would like to provide about EOL, or any details about why you never use EOL?	N/A	